

LAST REVISED DATE: 05/01/2017

General Information

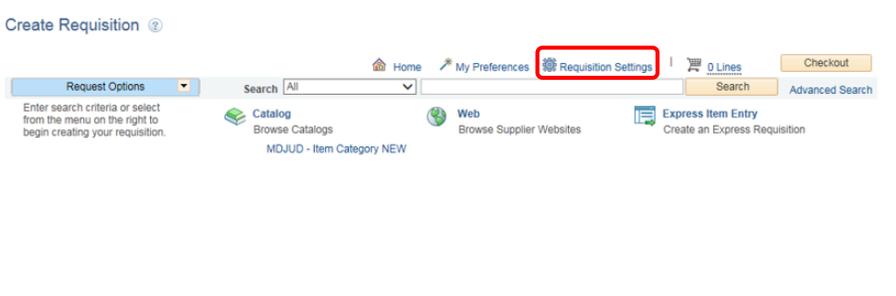
Task	Process Information
<p align="center">Creating an eProcurement Requisition</p>	<p>A requisition is created in the eProcurement module for procuring goods/services.</p> <p>NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs: Per the FY17 Procurement Policy Change, Receipts <u>will no longer be REQUIRED</u> for <u>Services</u> under Corporate POs (POs created by DPCGA). However, receipts are required for all Goods received, and POs created by DPCGA for Goods will be set to Receipt Required. If you have purchases from a vendor for both Goods and Services, please make sure you create separate lines on your Requisition, so separate lines will be created on your PO. If there is any question by DPCGA as to whether the item is considered Goods or Services, the PO will default to Receipt Required. The Line Details on your PO will indicate if receiving is required. If you want Receipts for Services on your PO, please indicate this request on your Requisition.</p>

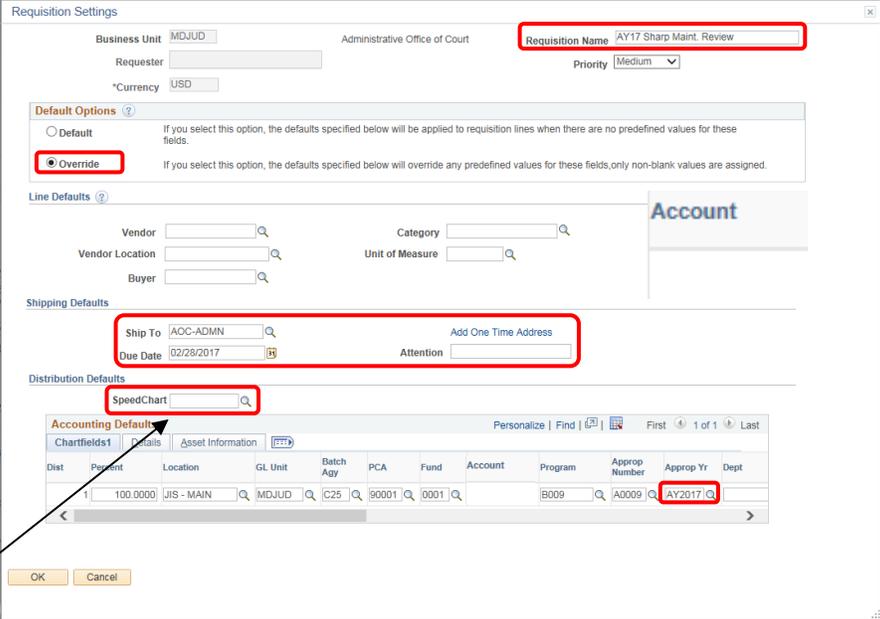
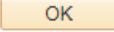
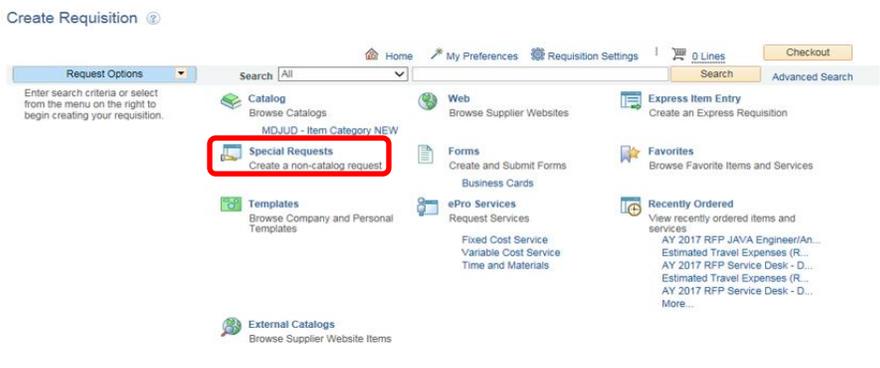
GEARS Navigation

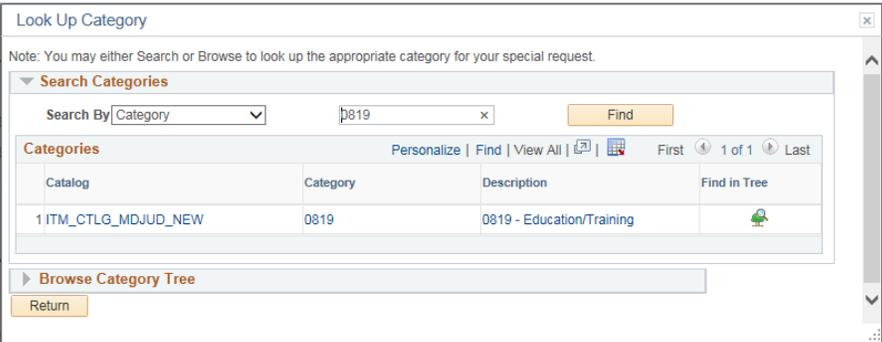
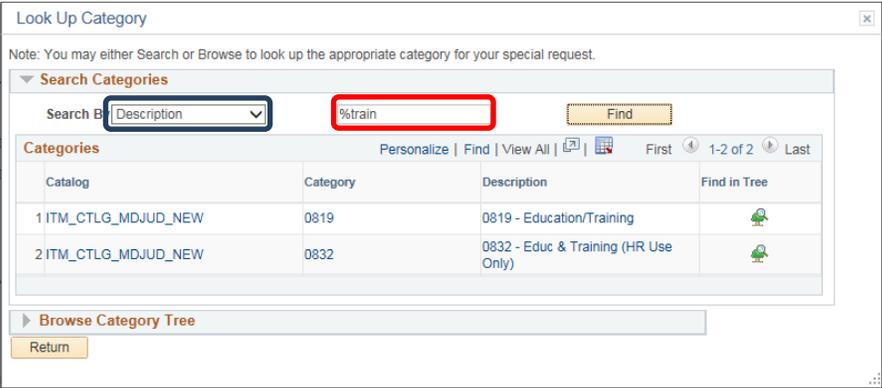
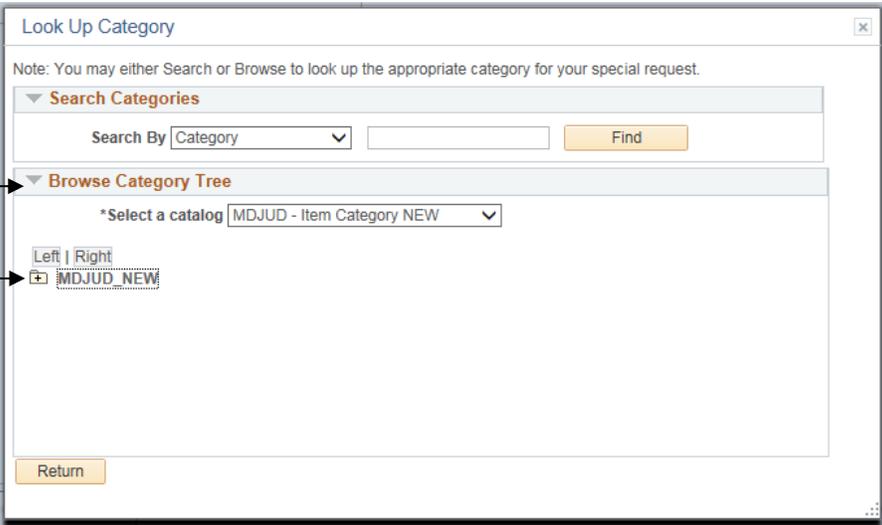
<p>Main Menu > eProcurement > Requisition</p>	
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
<p>1.</p>	<p>Click on the link Requisition Settings. This is where you'll setup the defaults for your Requisition.</p>	

<p>2. On the pop-up window that opens, enter your Requisition name.</p> <p>NOTES:</p> <ol style="list-style-type: none"> It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, AY17 Adobe Products. <p>Requisition Name: <input type="text"/></p> <ol style="list-style-type: none"> Click on the Override radio button. The defaults entered on steps 3 & 4 will populate on <u>ALL</u> your requisition lines. Enter the Ship To, Due Date and Attention fields, if needed. To use the SpeedChart field, you can search for your PCA by using the  feature. Notice that the Account and Approp Yr Chartfields are blank. Enter the Approp Yr and leave the Account blank. 	 <p>Multiple PCA's per line: If you need to divide the expenses on your Req. lines to multiple PCA's on a percentage basis, it can be done on this page. Please contact GEARS support, if you need help with this feature.</p>
<p>3. Click the  button.</p>	
<p>4. Click on the link Special Requests.</p>	
<p>5. Add items and/or services.</p> <p>Fill in all fields marked with an asterisk (Item Description, Price, Quantity, and Unit of Measure).</p> <p>Note: You can search for the Category by selecting the magnifying glass.</p>	<p>Special Requests ?</p> <p>Enter information about the non-catalog item you would like to order.</p> <p>Item Details</p> <p>*Item Description <input type="text" value="Training Materials"/></p> <p>*Price <input type="text" value="100"/></p> <p>*Quantity <input type="text" value="1"/></p> <p>*Category <input type="text" value=""/></p> <p>*Currency <input type="text" value="USD"/></p> <p>*Unit of Measure <input type="text" value="EA"/></p> <p>Due Date <input type="text" value=""/></p>

<p>6. On the Look Up Category screen.</p> <p>Choose either Search Categories or Browse Category Tree to look up the appropriate category for your requisition.</p> <p>NOTE: Do either 6a or 6b.</p> <p>6a. To Search Categories</p> <p>Note: The category Codes are the same as our existing account codes.</p> <p><i>If you know the appropriate account code for your purchase, you can enter it, as the category code will be the same.</i></p>	<p>You can look up Category by Account #</p>  <p>You can also look up Categories by Description (<i>be sure to change the Search By value to 'Description'</i>). The % before the search keyword will look for the search keyword anywhere within the Description. In this case, the system searches for the word train in all the category descriptions.</p> 
<p>6b. To Browse Category Tree</p> <ul style="list-style-type: none"> Expand the section by clicking the + Select a catalog from the dropdown list and click the + to browse the categories within. <p>For example, if the account code to be used on your requisition line is 0819 (Education/Training), you would choose 0819 as the category.</p>	

- Select the row containing the good/service you wish to procure.
- Your selection will appear in the Category field on the “Add Items and Services” screen.



0815 - Laundry
0817 - Legal Services
0819 - Education/Training
0820 - Medical Care
0821 - Management Studies & Co

Item Details

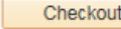
*Item Description

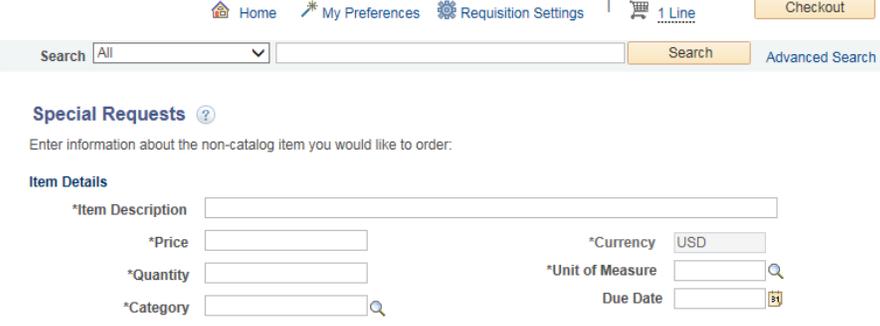
*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

7. Click the  button.

8. If you’re requesting multiple items, you can continue adding **Items** to your cart. When you are done adding **Items**, click on the  button.



Home My Preferences Requisition Settings 1 Line Checkout

Search Search Advanced Search

Special Requests

Enter information about the non-catalog item you would like to order.

Item Details

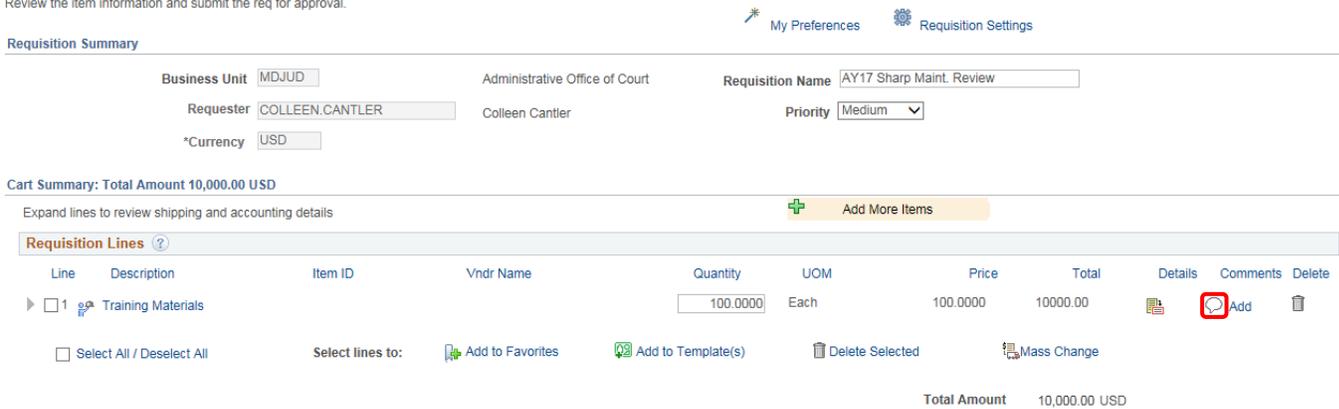
*Item Description

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

9. **Checkout - Review and Submit**
Review the item information and submit the req for approval.



My Preferences Requisition Settings

Requisition Summary

Business Unit Administrative Office of Court Requisition Name

Requester Colleen Cantler Priority

*Currency

Cart Summary: Total Amount 10,000.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Training Materials			100.0000	Each	100.0000	10000.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 10,000.00 USD

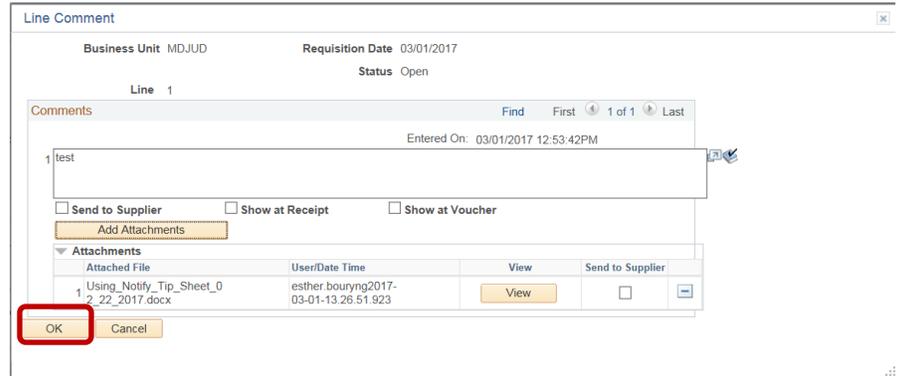
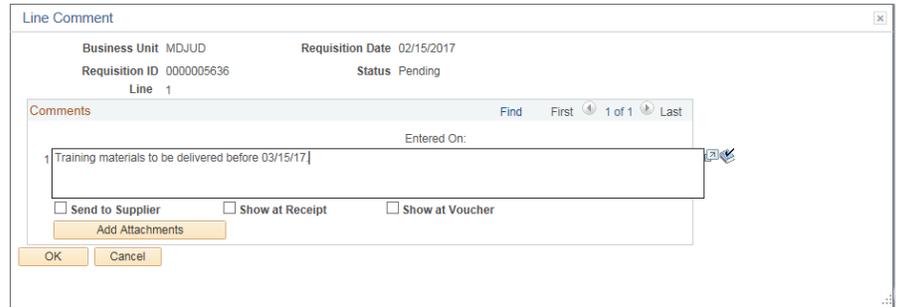
To add comments or attachments about line items, select the icon at the far right of the line.

10. You can add comments in the comments section and click on the  icon to add attachments.

Navigate to the location of your file by clicking **Browse**, select your file and then click the **Upload** button.

Note: Please ensure that the file name does not exceed 65 characters as it will fail.

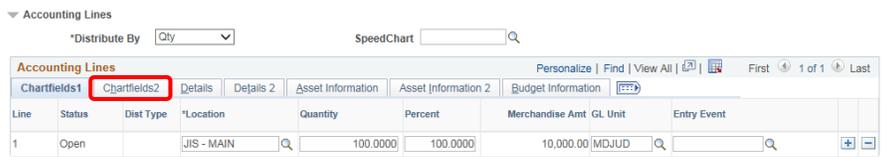
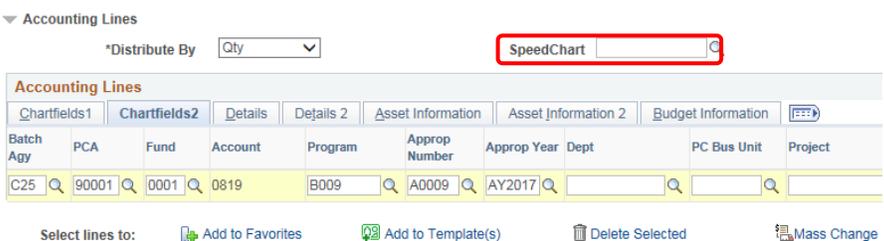
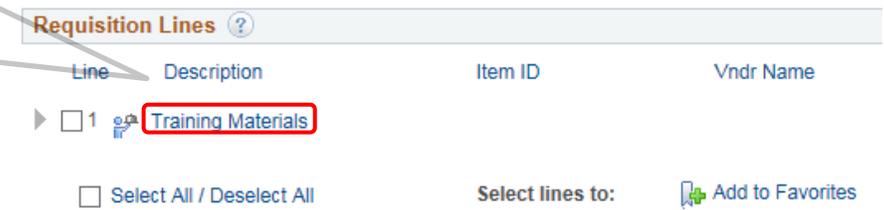
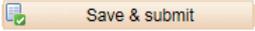
After the attachment has been successfully uploaded, click the  button.



11.

Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete
 1	Training Materials			100.0000	Each	100.000	10000.00		 Add	
Shipping Line 1		*Ship To	AOC-ADMN	Quantity		100.0000		Price Adjustment Pegging Inquiry Pegging Workbench		
		Address	580 TAYLOR AVENUE ANNAPOLIS, MD 21401	Add One Time Address		Price	100.0000			
		Attention To	Colleen Cantler							
		Due Date	02/28/2017							
		 Accounting Lines								
<input type="checkbox"/> Select All / Deselect All		Select lines to:								
							Total Amount	10,000.00 USD		

Click on the  icon near **Line**. Then click on the  icon to the left of **Accounting Lines**.

<p>12.</p>	<p>Click on the tab Chartfields 2 to view your chartfields.</p>	 <p>The screenshot shows the 'Accounting Lines' section with a dropdown menu set to 'Qty' and a 'SpeedChart' field. Below this, a tabbed interface is visible with 'Chartfields2' selected. A table below the tabs shows one line with status 'Open', location 'JIS - MAIN', quantity '100.0000', and merchandise amount '10,000.00'.</p>
<p>13.</p>	<p>If you need to change the PCA on the Req. line, you can do that by entering the PCA in the SpeedChart field. If you change the PCA, you'll have to re-enter the Approp Yr.</p>	 <p>The screenshot shows the 'Accounting Lines' section with 'SpeedChart' highlighted in a red box. Below it, a more detailed 'Accounting Lines' table is shown with columns for Batch Agy, PCA, Fund, Account, Program, Approp Number, Approp Year, Dept, PC Bus Unit, and Project. The 'Account' field is populated with '0819'. Below the table are options to 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'.</p> <p>The Account field is populated based on the category you've chosen. <u>You cannot change the account # on this panel.</u> If you need to change the account, you can click on the line description (seen below) and then change the category, which will then default in a new Account value based on the newly selected Category.</p> <p>Cart Summary: Total Amount 10,000.00 USD</p> <p>Expand lines to review shipping and accounting details</p>  <p>The screenshot shows the 'Requisition Lines' section with a table containing one line: '1 Training Materials'. The 'Training Materials' text is highlighted in a red box. Below the table are options to 'Select All / Deselect All' and 'Add to Favorites'.</p>
<p>14.</p>	<p>Click the  link at the bottom of the page.</p>	

Special Requests ?

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description Training Materials

*Price 100.0000

*Quantity 100.0000

*Category 0819

<p>15.</p> <p>On the Confirmation page, you'll see your Requisition number.</p> <p>Budget Check your Req. by clicking on the link  Check Budget .</p> <p>You'll see a  processing graphic on the top right side of your screen.</p>	<p>Confirmation</p> <p>Your requisition has been submitted.</p> <p>Requested For Colleen Cantler Number of Lines 1</p> <p>Requisition Name AY17 Sharp Maint. Review Total Amount 10,000.00 USD</p> <p>Requisition ID 000005636</p> <p>Business Unit MDJUD</p> <p>Status Pending</p> <p>Priority Medium</p> <p>Budget Status Not Checked</p> <p> View printable version  Edit This Requisition  Check Budget</p> <p>JIS Approvals</p> <p>AY17 Sharp Maint. Review:Pending</p> <p>JIS Approvals</p> <p>Pending Multiple Approvers JIS Level 1 Approver → Not Routed Multiple Approvers JIS Level 2 Approver → Not Routed Multiple Approvers Dept of Budget Approver</p> <p>Apply Approval Changes</p> <p> Create New Requisition  Manage Requisitions</p>
<p>16.</p> <p>Once the Budget Check completes, verify that you Budget Status is Valid.</p> <p>Depending on the rules that apply to your area, your Requisition will be routed for the necessary Approvals. You'll receive email notifications and Worklist Items in your Worklist when:</p> <ol style="list-style-type: none"> 1. Your Requisition has been Approved. 2. The PO associated with your Req. is Dispatched to the Vendor. 	<p>Confirmation</p> <p>Your requisition has been submitted.</p> <p>Requested For Colleen Cantler Number of Lines 1</p> <p>Requisition Name AY17 Sharp Maint. Review Total Amount 10,000.00 USD</p> <p>Requisition ID 000005636 Pre-Encumbrance Balance 10000.00 USD</p> <p>Business Unit MDJUD</p> <p>Status Pending</p> <p>Priority Medium</p> <p>Budget Status Valid</p> <p> View printable version  Edit This Requisition</p> <p>JIS Approvals</p> <p>AY17 Sharp Maint. Review:Pending</p> <p>JIS Approvals</p> <p>Pending Multiple Approvers JIS Level 1 Approver → Not Routed Multiple Approvers JIS Level 2 Approver → Not Routed Multiple Approvers Dept of Budget Approver</p> <p>Apply Approval Changes</p> <p> Create New Requisition  Manage Requisitions</p>

 **End of Document**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.